Dalhousie University Archives and Special Collections
Basic Archivists' Toolkit User Manual

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1.0 Introduction

The following manual provides instructions on how to use the Archives and Special Collections (DUASC) Archivists' Toolkit database. It is not intended to replace the full user manual (available at: http://archivistst oolkit.org/http%3A/%252Farchivistst oolkit.org/support/AT1_5_User%20Manual). Rather, it is intended to show how to perform basic tasks, such as:

1. Logging into database
2. Searching and viewing the finding aids
3. Searching and viewing the accession records
4. Finding the physical location of an item

Detailed instructions on how to perform data entry can be found in the Archives and Special Collections Policies and Procedures Manual.

2.0 Log into Database

Note: Contact the Archives Specialist if you do not have an Archivists' Toolkit account. Your username and password should be your Dalhousie NetID and password. **If you change your NetID password, you will have to manually change your password in the Archivists' Toolkit database.**

1) Double-click on the Archivists Toolkit icon on your desktop or start menu:

2) Enter your Username and Password and click on the Login button:

Usernames are not case sensitive. Passwords are case sensitive.

3) If you do not wish to login, click cancel to close the database.

3.0 Archivists' Toolkit User Interface

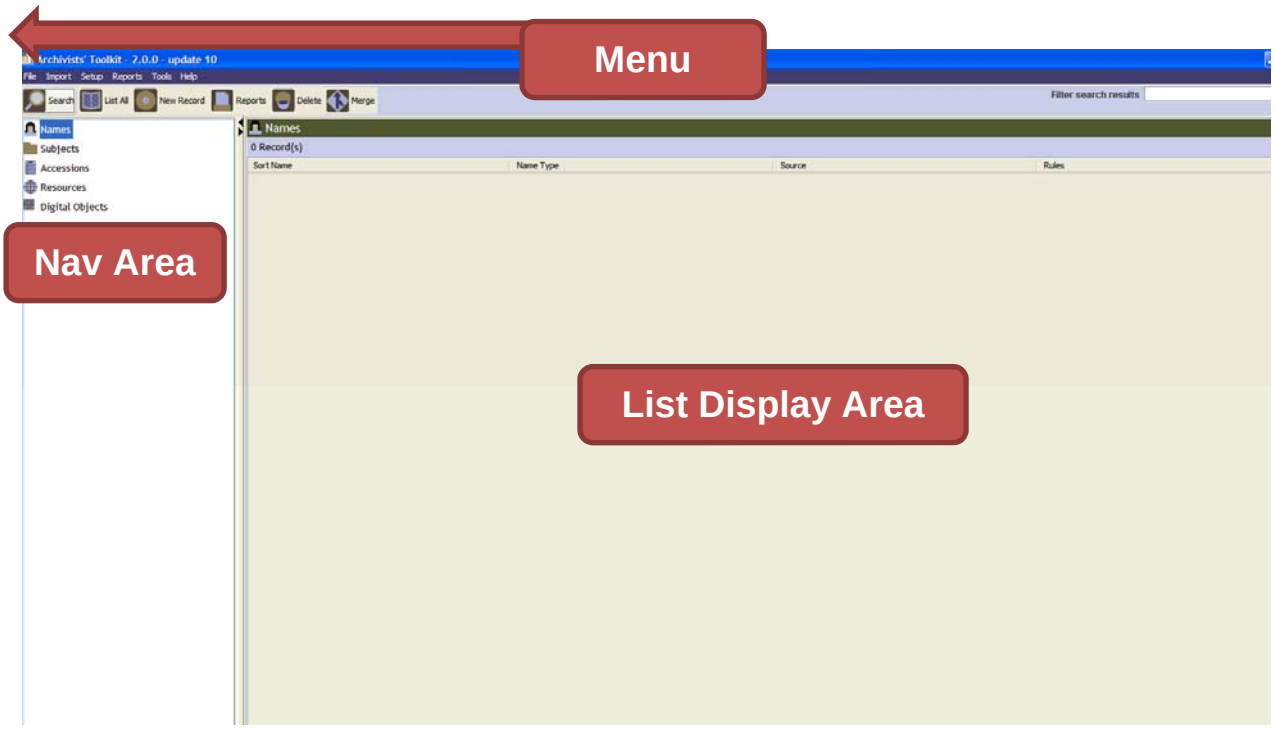
Note: This section of the manual provides information on the general layout of the Archivists' Toolkit. See Section 4.0 for information on browsing the database and Section 5.0 for information on opening and viewing records in the database.

1) Once you're logged in, you will see a blank Archivists' Toolkit screen. The primary screen has three main areas:

a. Horizontal Menu Area

b. Sidebar Navigation Area

c. List Display Area



See the Official Archivists' Toolkit User Manual for more information on each module.

3.1 Sidebar Navigation Area

1) The “Nav Area” sidebar on the left side of the screen contains icons for the five different sections of the database:

a. **Names (authority file)** – Contains the name authority file (personal, corporate body, or family) and can be used to show which accessions and/or resources have been associated with a particular name. The records serve as name headings in database exports (e.g., MARCXML).

b. **Subjects (authority file)** – Contains the subject authority file (i.e., topical terms, geographic terms, etc.) and can be used to show which accessions and/or resources have been associated with a particular subject term. Subject terms are primarily taken from LCSH. The subject records serve as subject headings in exports such as EAD, MARCXML, and MODS.

c. Accessions (all archival holdings) – Includes accession records and basic collection data.

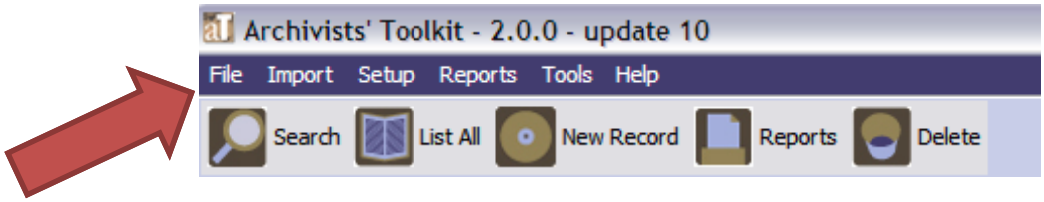
d. **Resources (i.e., Finding Aids)** – Includes finding aids for processed and partially processed archival fonds and collections. Each resource record contains sub-records for its components (i.e. series, sub-series, files, etc.), any associated digital objects, and container information (referred to as “instances”). A sub-record is a linked record that can only be viewed, created, and edited through the primary record.

1) Digital Objects (descriptive records for digital objects managed by DUASC) – For describing digital objects. Digital object records can be exported as part of a resource record or as individual records in MARC, MODS, METS, and Dublin Core.

2) Double-click on the icon to show the database records for that section of the database.

3.2 Menu Area

1) The Menu area is the horizontal bar across the top of the database window.



It can be used for basic functions such as:

a. Searching different sections of the database
b. Creating new database records
c. Generating reports
d. Importing and exporting database records
e. Closing the database

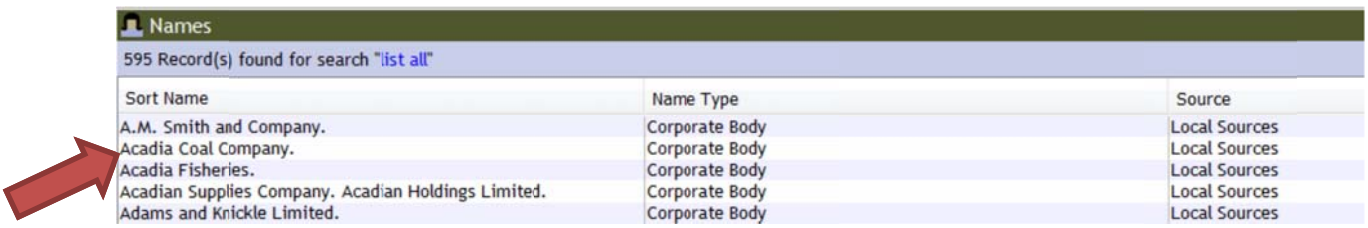
2) The buttons in the menu area do different things depending on which area of the database you are working with. For example, the "Search" button will bring up a different search box for each section of the database.

3) **Make sure you have selected the appropriate section in the sidebar area before using the menu buttons.**

3.3 List Display Area

1) The list display area is where database records are displayed.

2) Again, the records displayed depend on which section of the database you are working with. For example, if you double-click on the "Names" section, it will display a table with the names and other information contained in the database:



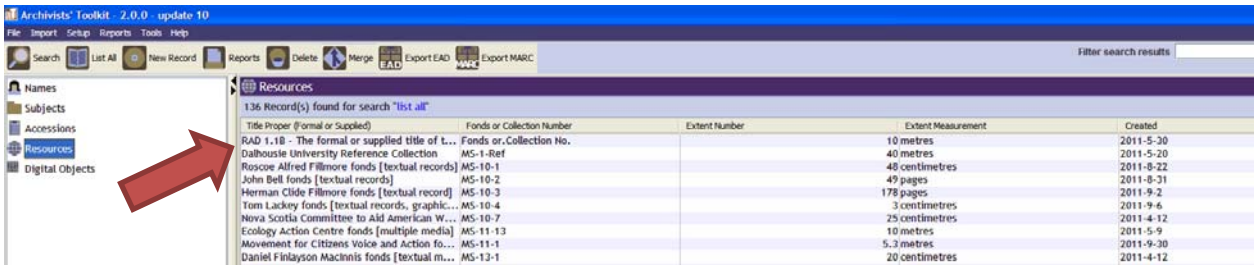
But if you double-click on another section, the List Display Area will show different columns of information.

4.0 Browse the Database

Note: This section of the manual provides instructions on how to browse each module in the database. See Sections 5.0 and 6.0 for instructions on opening and viewing individual database records.

4.1 Listing Records

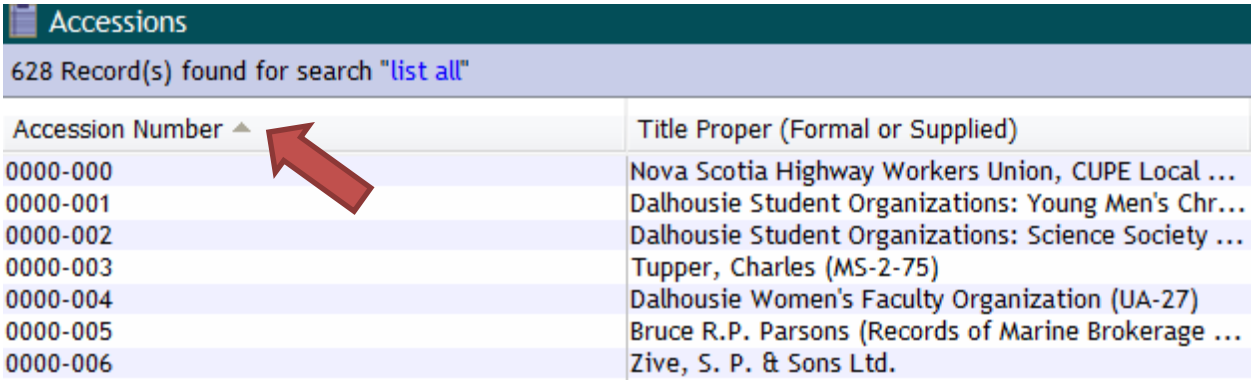
1) Double-click on any of the icons in the sidebar to show all the records contained in that module:



2) You can also single-click on the icon and use the “List All” button in the menu area.

4.2 Sorting Record Lists

1) Record lists can be sorted by any column, in ascending or descending order. Simply click on the column you want to sort by. This will sort in ascending order. The order will be indicated by an up or down arrow next to the column header.



2) Click on the column again to sort in descending order.

5.0 Opening and Viewing Finding Aids and Accession Records

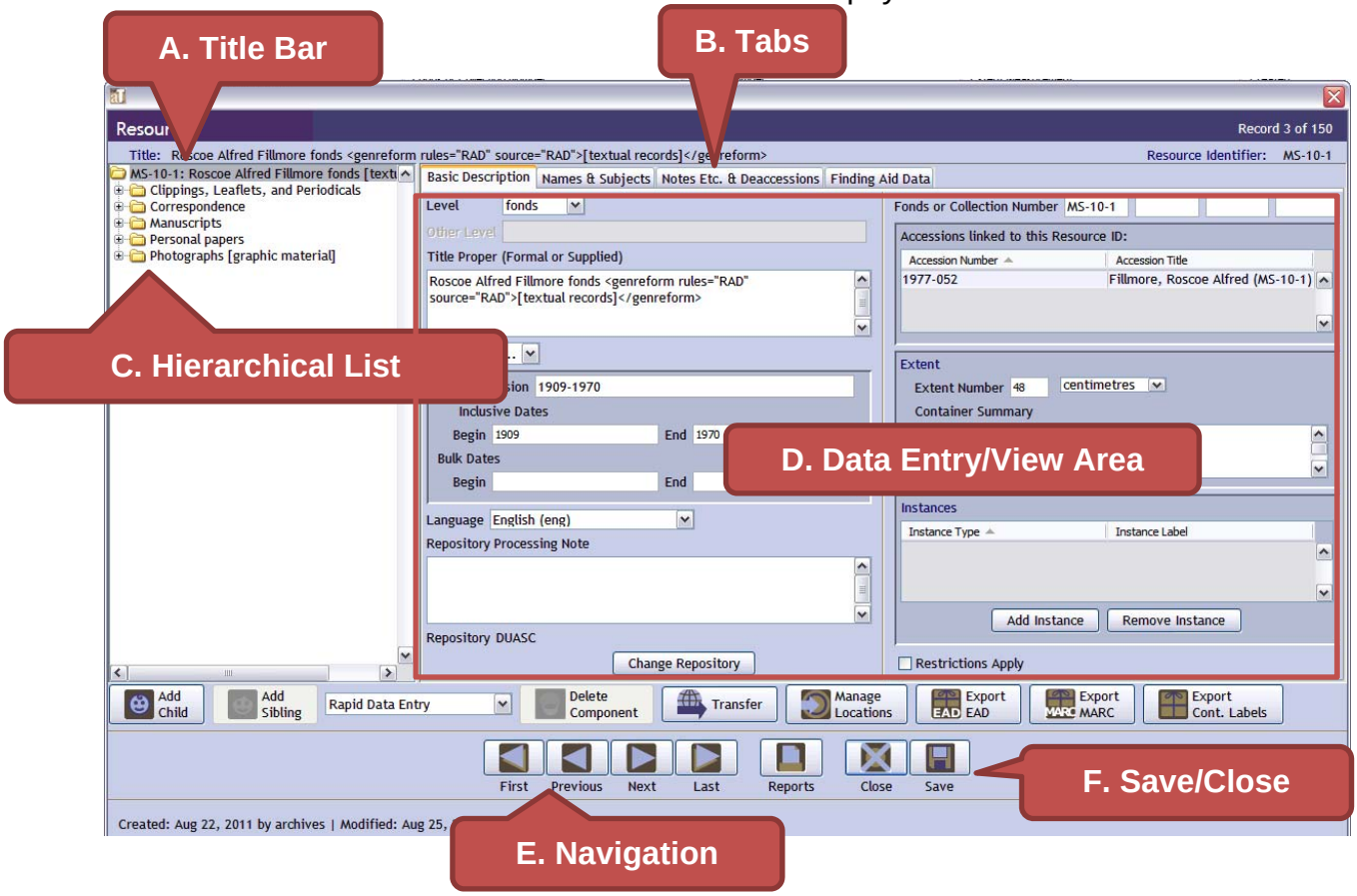
Note: This section of the manual provides information on how to open and view Resource Records (i.e., Finding Aids) and Accession Records.

You may find it helpful to increase the size of the record window when it opens. By default, the right-hand side of the window is cropped. See Section 7.0 for guidance on searching the Archivists' Toolkit.

1) Once you have found the database record you want to examine, double-click on the table row to view the record in a new window.
2) The window will have different fields depending on which section of the database you are working with.

5.1 Basic Components of a Resource Record (i.e., Finding Aid)

1) The following screenshot highlights the basic components of a Resource Record. You must become familiar with the tabs, sidebar navigation, and location of key information such as Box-Folder numbers and physical location.

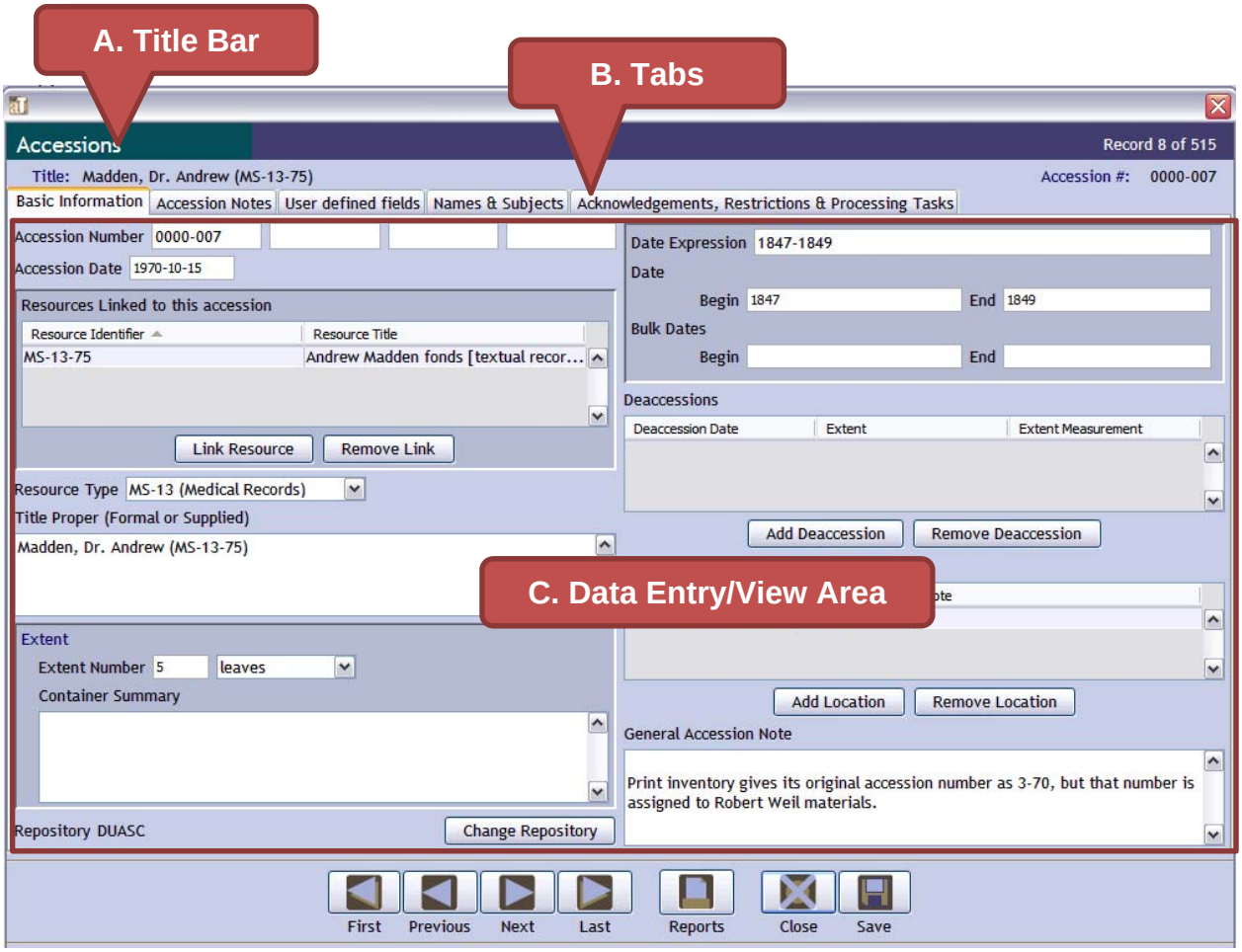


a. **Title Bar** – The title bar indicates the type of record (i.e., Resource) and the title and identification number (i.e., fonds number) of the material described in the record. Each module has its own color scheme.
b. **Tabs –** The tabs allow you to browse through the entire resource record. There are four tabs for Resource records:
    i. **Basic Description –** contains title, date, language, extent, and box folder number (if applicable)
    ii. **Names and Subjects –** lists the names and subject terms associated with the resource record. Names and subjects are pulled from the authority files in the Names and Subjects modules
    iii. **Notes and Deaccessions, etc.** – Contains all additional notes about the resource (i.e., Section 1.8 of RAD). Also contains information about any deaccessions associated with the resource record (deaccession records can also be associated with individual accessions)
    iv. **Finding Aid Data –** Only appears at the highest level of a resource record. Contains information about the finding aid (e.g., title and author of document, status of finding aid, location (i.e., URL) of finding aid, etc.
c. **Hierarchical List** – Also called a Component List. This area provides a tree-view for the entire fonds or collection. Open and close folders to expand or collapse the hierarchical structure of the fonds. Use this area to browse within a resource record.
d. **Data Entry/View Area** – This area contains the form fields for entering and viewing information about a Resource. The form fields will change slightly depending on which level of the Resource you are viewing. At the highest level of a Resource Record, this area also shows links to Accession Records associated with the Resource.
e. **Navigation Buttons** – These buttons are for navigating records in a list. The buttons allow you to switch Resources (i.e., to browse between from one fonds to another). The buttons cannot be used to browse within a Resource record (use the Hierarchical List for this).
f. **Save/Close Buttons** – These buttons are for saving and closing the form. It is very important to save your work frequently. Use the Close button rather than the “Red X” in the top right corner.

5.2 Basic Components of an Accession Record

Note: Archivists' Toolkit Accession Records are linked Resource, Name, and Subject records. They also contain links to digitized case files with further documentation about the accession. This section of the database has replaced the old Microsoft Access database.

1) The following screenshot highlights the basic components of an Accession Record. You must become familiar with the tabs and location of key information such as scope and content and physical location. **Note that the fields in the data entry/view area change depending on which tab you select.**



a. **Title Bar** – The title bar indicates the type of record (i.e., Accesssions) and the title and accession number of the materials described in the record.
b. **Tabs –** The tabs organize different kinds of information about the Accession record. There are five tabs for Accession records:

i. **Basic Information –** Contains accession number, title, date of accession, date range, extent, and physical location information. The Basic Information tab also shows if the Accession record is linked to a Resource record or Deaccession record.

ii. **Accession Notes** – Indicates the type of accession (e.g., donation, purchase, etc.), and contains a Scope and Content note, Inventory (if applicable), Condition note, and Disposition note. The Accession Notes tab also contains a link to the Case File and any other external documents (e.g., file list, database, etc.).

iii. **User-Defined Fields** – Contains information about monetary appraisal (if applicable) and the name of the person who accessioned the materials.

iv. **Names and Subjects** – Contains links to name and subject authority records that have been associated with the accession record.

v. **Acknowledgements, Restrictions, and Processing Tasks** – Contains information about access and use restrictions (if applicable) and tracks relevant exchanges between the donor and DUASC (e.g., deed of gift, acknowledgement of receipt, etc.). This tab also contains information about archival processing priorities and plans.

c. **Data Entry/View Area** – This is the main portion of the Accession record window. It contains data entry/view fields for various information about the accession. Remember, this area changes based on the tab you have selected. It is important to become familiar with what information is included under each tab.

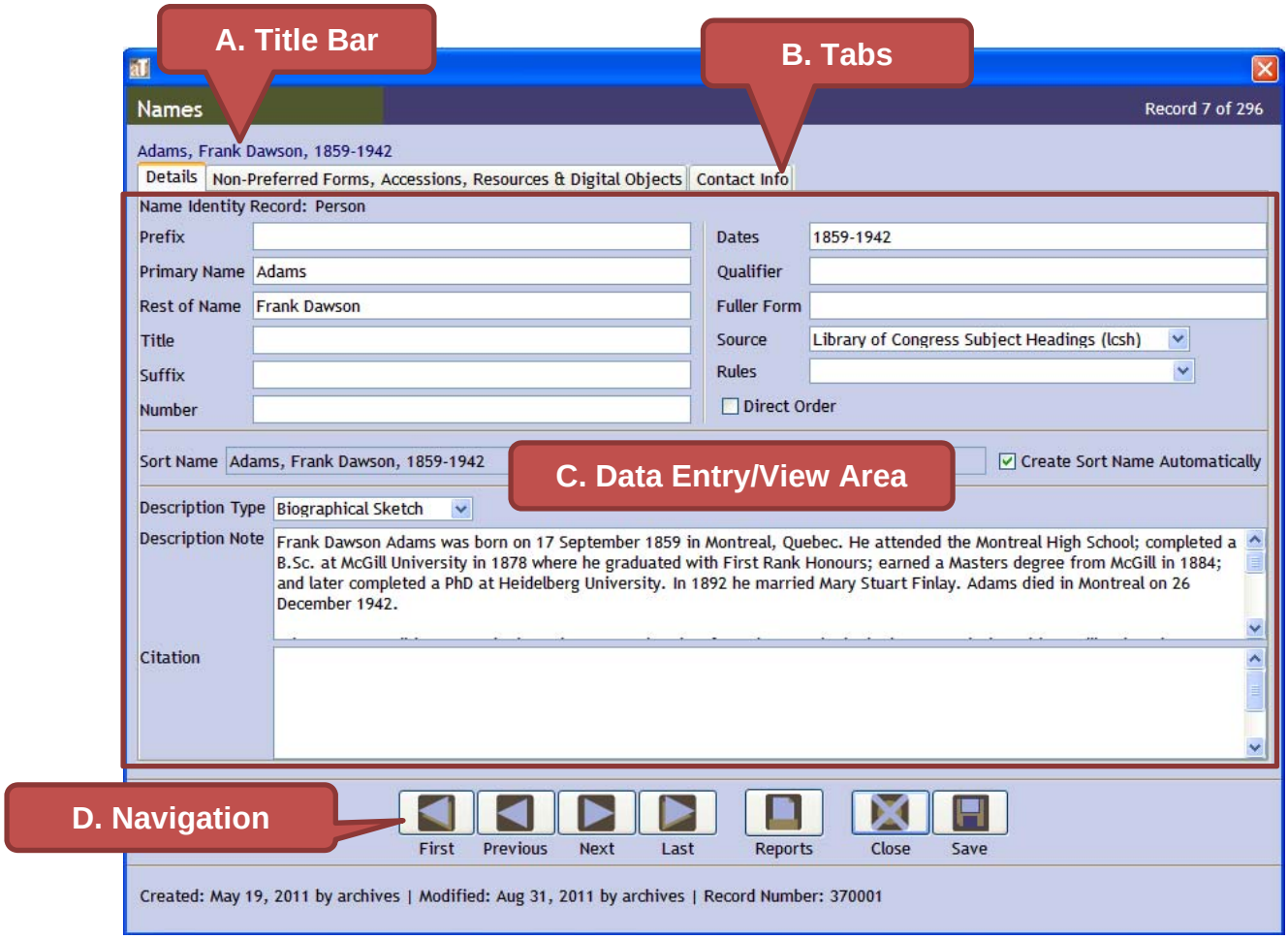
6.0 Opening and Viewing Name and Subject Records

Note: This section of the manual provides information on how to open and view Name and Subject authority records. See Section 7.0 for guidance on searching the Archivists' Toolkit.

1) Once you have found the name or subject record you want to view, double-click on the table row to open the record in a new window. You can also right-click and select "Edit" from the drop-down menu that appears.
2) The new window will have different fields depending on whether you are viewing a name or subject record. **Person name records will have a slightly different window than Corporate Bodies or Families.**

6.1 Basic Components of a Name Record

1) The following screenshot highlights the basic components of a Name record:

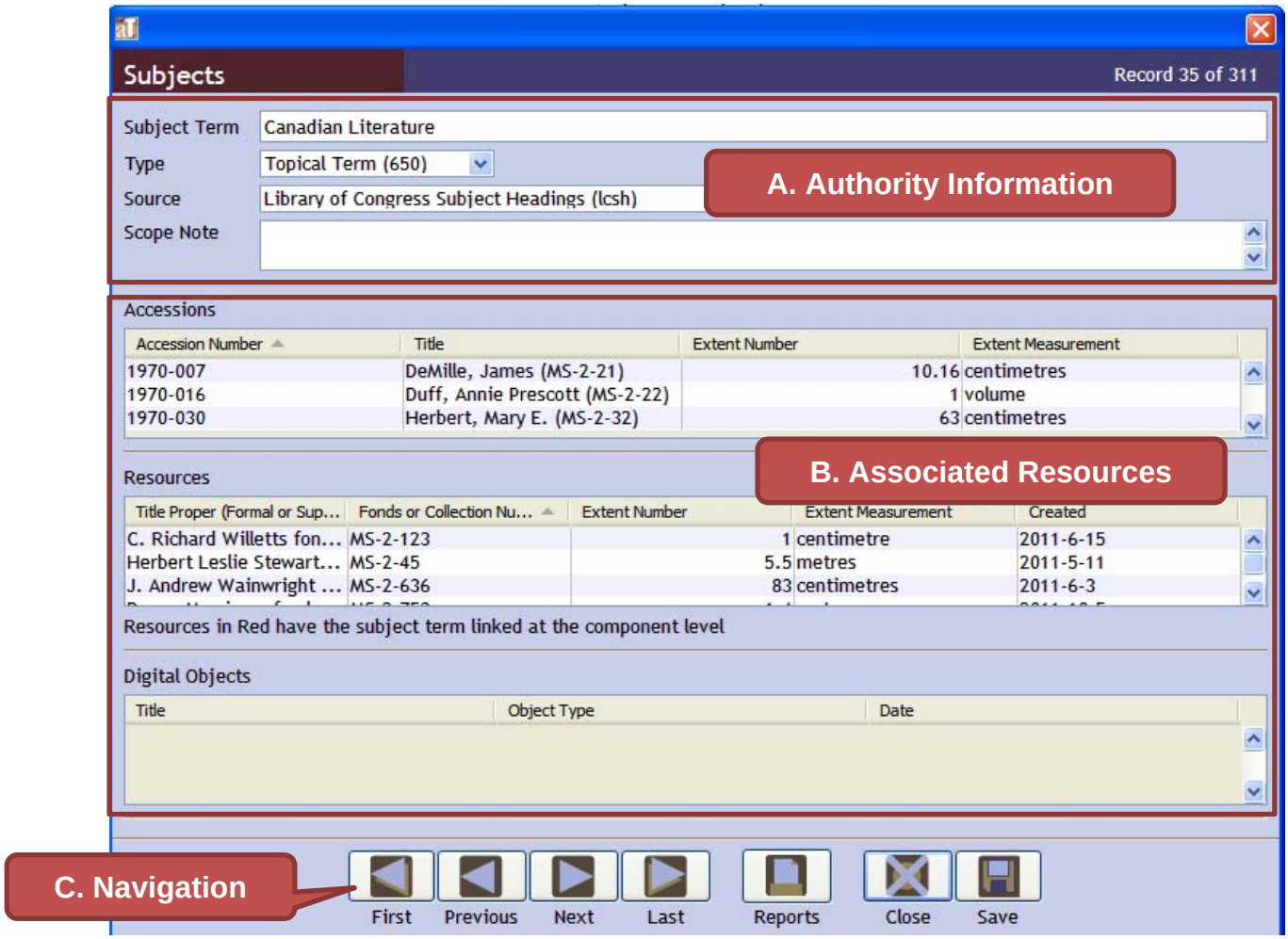


a. **Details** – Basic information about the name authority record, including the name, fuller form of the name (if applicable), source of authority (e.g., Library of Congress Subject Headings), biographical sketch, and citations.
b. **Non-Preferred Forms, Accessions, Resources, and Digital Objects** – Contains alternative versions of the name (if available) and links to accessions, finding aids, and digital objects associated with that name.
c. **Contact Info –** Contact information for the name **(used only for donors).**
d. **Navigation –** Contains buttons to scroll between name records, go to first or last record, generate reports, save changes, and close the window.

2) Remember, the Details screen for Corporate Body authority records is slightly different, but the other tabs are the same.

6.2 Basic Components of a Subject Record

1) The following screenshot highlights the basic components of a subject record:



7.0 Searching the Database

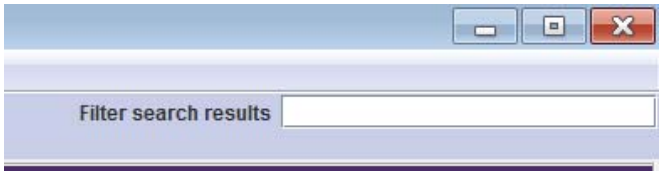
Note: This section of the manual provides information on how to search the database. General searches can be conducted in each module, but the search options and results will vary depending on which module you choose. Make sure you are working in the section that contains the information you are looking for (e.g., you cannot search the Names section for file titles).

The best way to search for processed archival materials is to search the Resources Module (i.e., Finding Aids).

1) Determine which section of the database you need to search. Double click that section to list all records in the "List Display Area."
2) Click on the "Search" icon in the Horizontal Menu Area.
3) A search box will appear in a new window. Your search results will appear in the "List Display Area."
4) See the instructions below for each section of the database.

7.1 Filtering the List Display Area

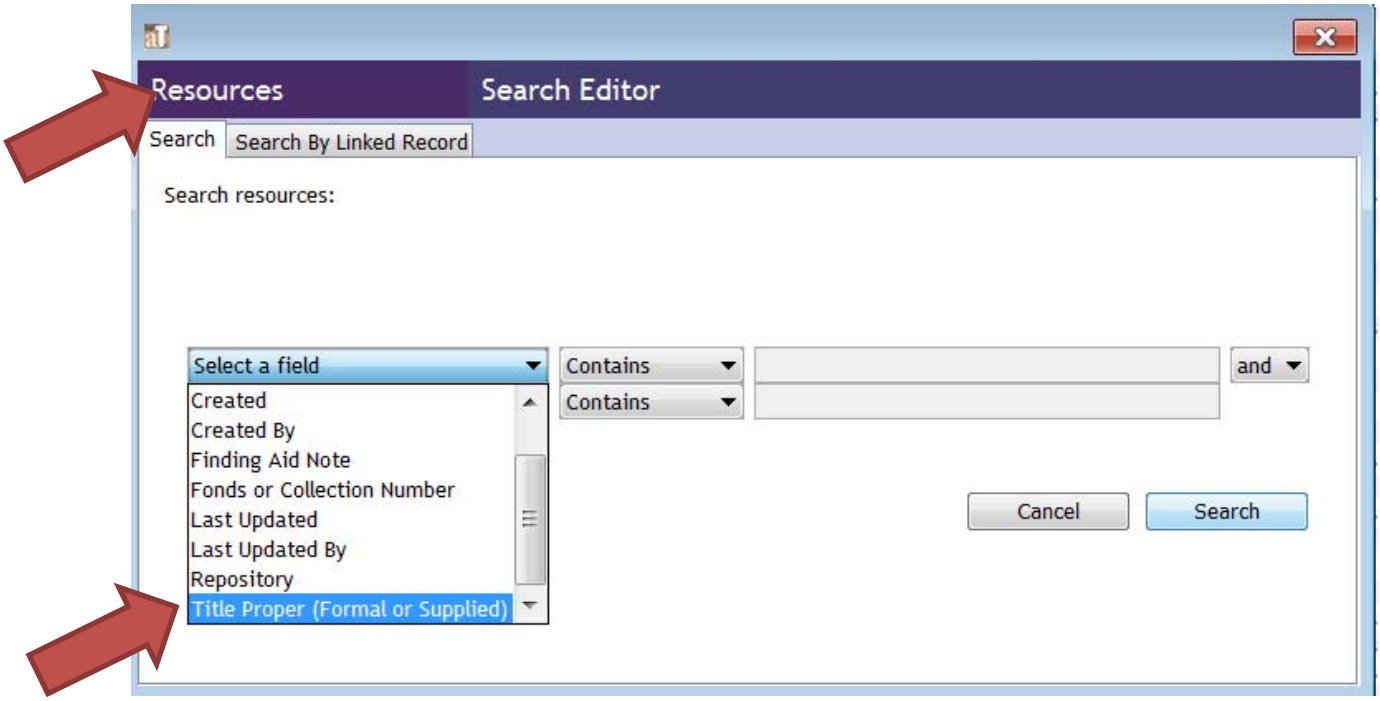
1) Record lists from all sections of the database can be filtered using the "Filter Search Results" box in the upper right corner of the primary database window.



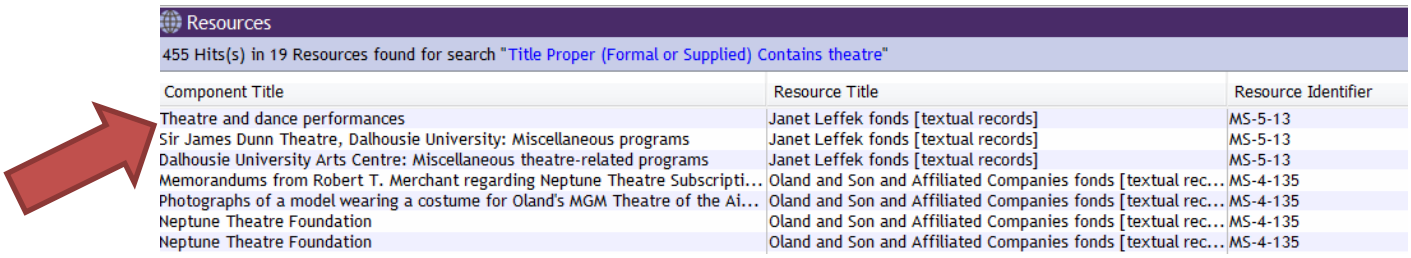
2) The filter will only search data that is displayed in the List Display Area.
    a. For example, when you are displaying the complete list of resource records, the filter can be used to search for "Title Proper" and/or "Fonds or Collection Number."
    b. When you are displaying the complete list of accession records, the filter can be used to search for "Accession Number," "Title Proper," and "Scope and Content."
3) Simply double-click on the record to open it in a new window.
4) **The filter is the best way to locate materials by accession or fonds number.**

7.2 Searching Resource Records (i.e., Finding Aids)

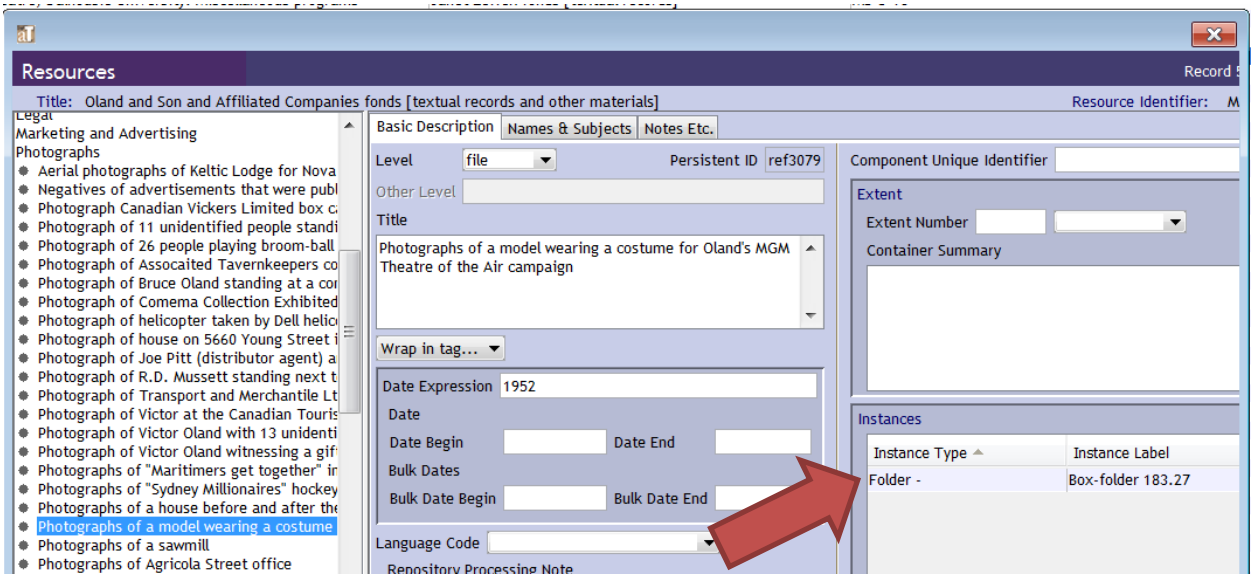
1) Double-click on the Resources Icon in the Sidebar Navigation Area.
2) Click on the Search Icon in the Horizontal Menu Area.
3) This will bring up a search editor in a new window. **Notice that it is specific to the Resources section of the database.**



4) Use the Drop-Down menu to select a search field**. For general keyword searching, the "Title Proper" field is recommended.**
   a. Note searching the "Title Proper" field will bring up results for fonds-, series-, and file-level descriptions.
5) Use the second Drop-Down menu to put an operator on your search (not usually necessary).
6) Enter your search term and click "Search."
7) The search editor will close and your results will appear in the "List Display Area."


Resources
455 Hits(s) in 19 Resources found for search "Title Proper (Formal or Supplied) Contains theatre"
Component Title
Resource Title
Resource Identifier
Theatre and dance performances
Janet Leffek fonds [textual records]
MS-5-13
Sir James Dunn Theatre, Dalhousie University: Miscellaneous programs
Janet Leffek fonds [textual records]
MS-5-13
Dalhousie University Arts Centre: Miscellaneous theatre-related programs
Janet Leffek fonds [textual records]
MS-5-13
Memorandums from Robert T. Merchant regarding Neptune Theatre Subscripti...
Oland and Son and Affiliated Companies fonds [textual rec...
MS-4-135
Photographs of a model wearing a costume for Oland's MGM Theatre of the Ai...
Oland and Son and Affiliated Companies fonds [textual rec...
MS-4-135
Neptune Theatre Foundation
Oland and Son and Affiliated Companies fonds [textual rec...
MS-4-135
Neptune Theatre Foundation
Oland and Son and Affiliated Companies fonds [textual rec...
MS-4-135

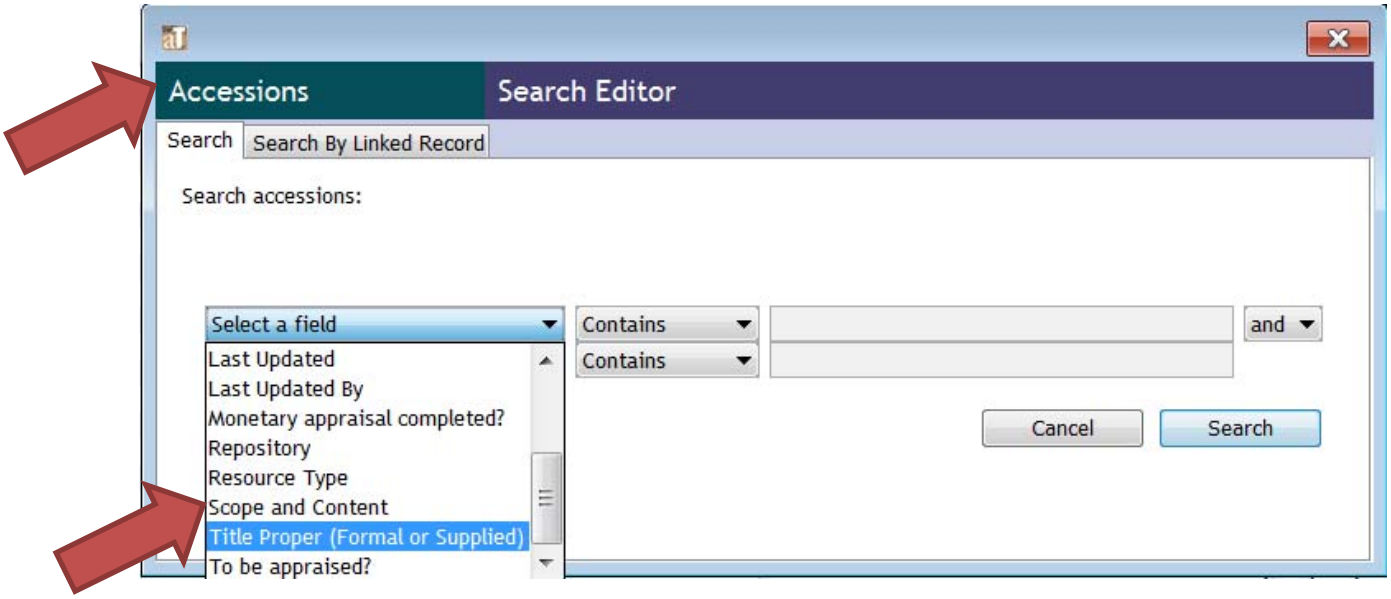
8) You will see the “Component Title,” (i.e., the title proper), the title of the fonds or collection to which it belongs, and the “Resource Identifier” (i.e., fonds or collection number).
9) Simply double-click on a search result to open the Resource Record. The Resource Record will open in a new window. Notice that the window opens up the specific file in which the search term was found. In this example, the Oland and Son (MS-4-135) Resource Record is opened to a file of photographs in which “theatre” appeared in the title.


Resources
Record
Title: Oland and Son and Affiliated Companies fonds [textual records and other materials]
Resource Identifier:
Marketing and Advertising
Photographs
Aerial photographs of Keltic Lodge for Nova
Negatives of advertisements that were publ
Photograph Canadian Vickers Limited box c
Photograph of 11 unidentified people standi
Photograph of 26 people playing broom-ball
Photograph of Assocaited Tavernkeepers co
Photograph of Bruce Oland standing at a co
Photograph of Comema Collection Exhibited
Photograph of helicopter taken by Dell helic
Photograph of house on 5660 Young Street i
Photograph of Joe Pitt (distributor agent) a
Photograph of R.D. Mussett standing next t
Photograph of Transport and Merchantile Lt
Photograph of Victor at the Canadian Touris
Photograph of Victor Oland with 13 unidenti
Photograph of Victor Oland witnessing a gif
Photographs of "Maritimers get together" in
Photographs of "Sydney Millionaires" hockey
Photographs of a house before and after the
Photographs of a model wearing a costume
Photographs of a sawmill
Photographs of Agricola Street office
Basic Description
Names & Subjects
Notes Etc.
Level
file
Persistent ID
ref3079
Other Level
Title
Photographs of a model wearing a costume for Oland's MGM Theatre of the Air campaign
Wrap in tag...
Date Expression
1952
Date
Date Begin
Date End
Bulk Dates
Bulk Date Begin
Bulk Date End
Language Code
Repository Processing Note
Component Unique Identifier
Extent
Extent Number
Container Summary
Instances
Instance Type
Instance Label
Folder -
Box-folder 183.27

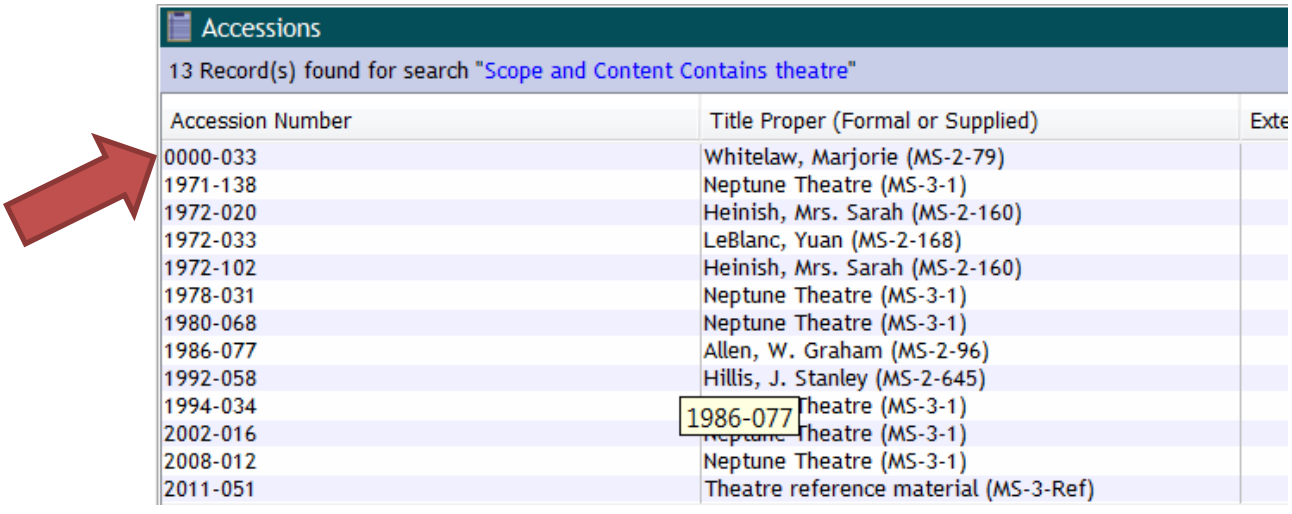
10) The arrangement information (i.e., series, sub-series, etc.) is displayed in the Sidebar Navigation Area.
11) The Box-Folder information can be found under the “Instance” section on the right side of the screen. Additional information can be found under the “Names and Subjects” and “Notes Etc.” tabs.
12) If the item in the record is not of interest, just close the window and go back to your search results.

7.3 Searching Accession Records

1) Double-click on the Accessions Icon in the Sidebar Navigation Area.
2) Click on the Search Icon in the Horizontal Menu Area.
3) This will bring up a search editor in a new window. **Notice that it is specific to the Accession section of the database.**



4) Use the Drop-Down menu to select a search field**. For general keyword searching, the "Scope and Content" field is recommended.**
5) Use the second Drop-Down menu to put an operator on your search (not usually necessary).
6) Enter your search term and click "Search."
7) The search editor will close and your results will appear in the "List Display Area."



8) You will see the "Accession Number," "Title Proper," extent information, and the "Scope and Content" note.

9) Simply double-click on a search result to open the Accession Record. The Accession Record will open in a new window.
10) Remember that the Scope and Content note is found under the “Accession Notes” tab, not the “Basic Information” tab.

7.4 Searching Name, Subject, and Digital Object Records

1) Searching name, subject, and digital object records works the same way.
2) Make sure you are in the appropriate section of the database, and use the search editor to conduct your search.
3) Remember, the Filter in the upper right corner of the primary database window is a great way to search name and subject terms.

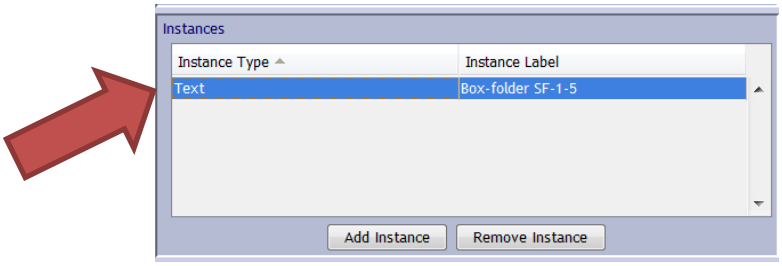
8.0 Finding Materials in the Stacks

Note: This section of the manual provides instructions on how to find the physical location of materials described in the Archivists' Toolkit. **The best place to start looking for the physical location of materials is the Resources module.** If the materials are unprocessed, you can check the Accession records.

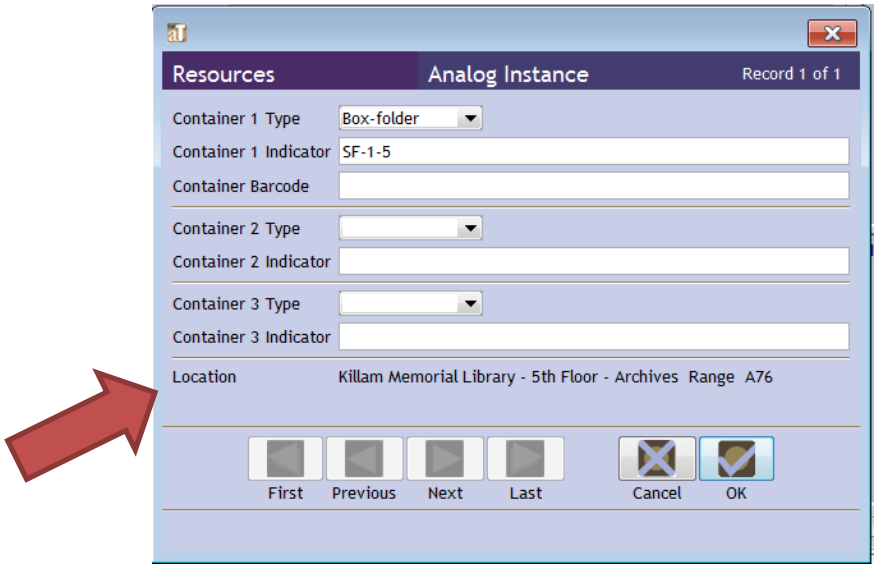
Note that the Archivists' Toolkit has far greater control over the physical location information than the previous Accessions database. Location information is provided at the individual box-folder level, rather than the fonds level.

8.1 Find Physical Location of an Individual File

1) Navigate to the Resource Record for the item(s) you are trying to find in the Archives Stacks. This can be done by searching (see Section 7.0) or by browsing the database (see Sections 4.0, 5.0, and 6.0)
2) The Box-Folder information is contained in the "Instance" section of the screen.



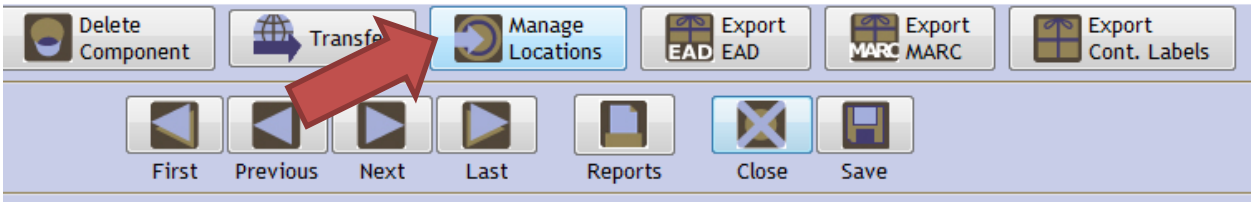
3) Double-click on the Instance. A new window will open up:



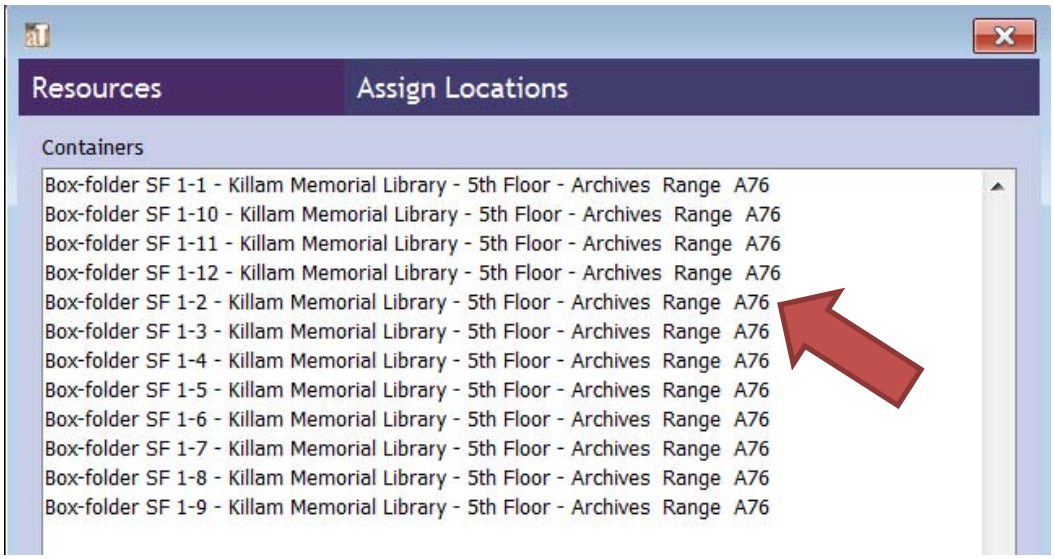
4) The physical location information is contained at the bottom of the window.
5) Note that this process should be repeated for each file requested at the Reference Desk. **Some types of material (e.g., photographs, oversized items, etc.) may not be stored in the same Range as the textual records.**

8.2 Find Physical Location for All Items in a Resource or Accession Record

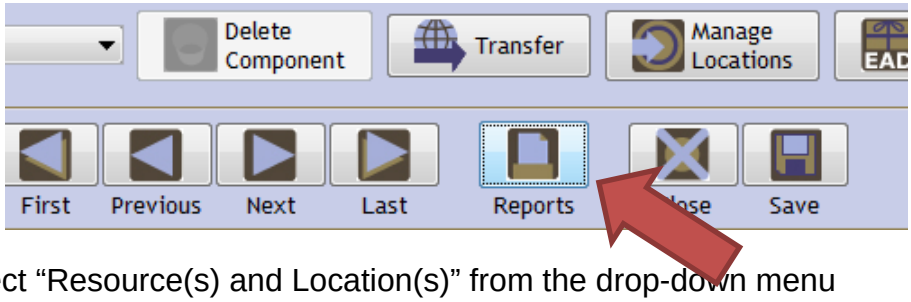
1) If you need to quickly find the physical location information for all items in a fonds or collection, click on the “Manage Locations” button. This could take a while for large fonds.



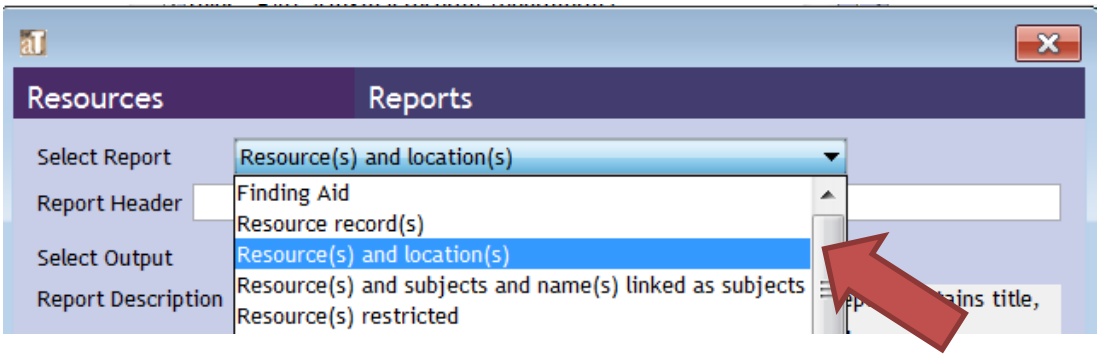
2) A new window will open with the location information for all files in the fonds or collection:


Resources
Assign Locations
Containers
Box-folder SF 1-1 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-10 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-11 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-12 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-2 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-3 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-4 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-5 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-6 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-7 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-8 - Killam Memorial Library - 5th Floor - Archives Range A76
Box-folder SF 1-9 - Killam Memorial Library - 5th Floor - Archives Range A76

3) Alternatively, you can create a report with the location information.
4) Navigate to a Resource or Accession record and click on the “Reports” button.



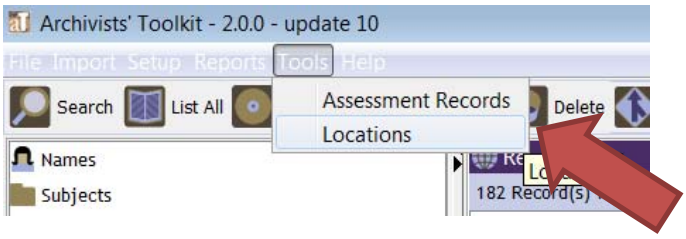
5) Select “Resource(s) and Location(s)” from the drop-down menu



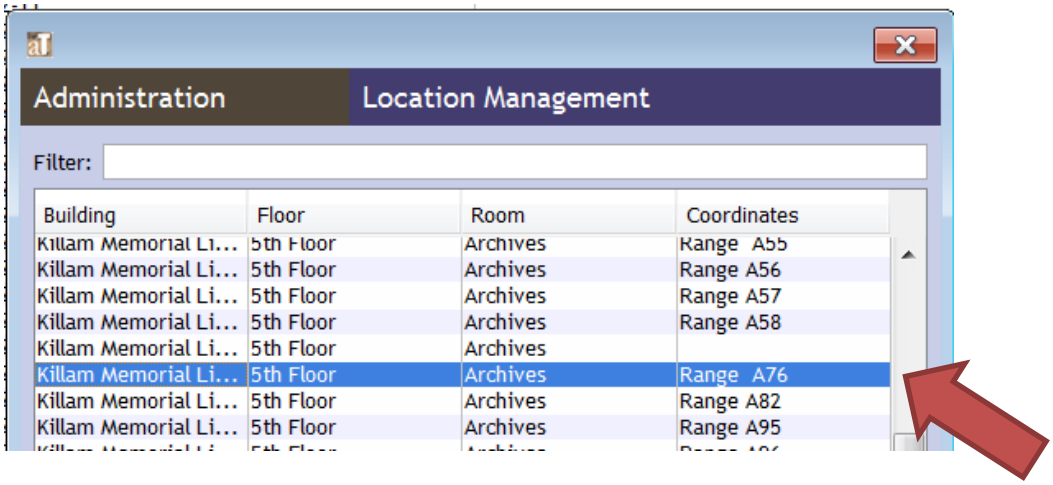
6) Choose the desired format for the report
   a. Send directly to printer
   b. PDF
   c. HTML
   d. RTF
   e. Excel or CSV
7) Select “Print” or “Save” to create the report. It will contain an itemized list of all physical locations for the resource or accession record.

8.3 Create List of All Materials in a Particular Location

1) If you want to create a list of all materials stored in a particular location (e.g., Range A76), select “Locations” from the Tools menu in the upper left corner of the primary database window.



2) A new “Location Management” window will appear. Select the location that you want to generate a report for and click on the “Reports” button:



3) Select the desired format for the report and click “Print” or “Save.”
4) The report will contain a list of accessions and/or resources stored in the physical location you selected:

Killam Memorial Library **Floor: 5th Floor**

Room: Archives

Coordinates: Range A76

Accession Title	Accession Number
Baird, Rev. Dr. Frank (MS-2-5)	1971-061
Corkum, Leo P. (MS-2-15)	1971-062
Blackburn Family (MS-2-10)	1971-060
Sons of Temperance, Columbia Division No. 24 (MS-2-14)	1971-056
McLelan, Archibald Woodbury (MS-2-87)	1971-068
Gould, Capt. Alfred (MS-2-86)	1971-067

9.0 Printing and Exporting Record Lists and Other Information

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Note: This section of the manual provides instructions on how to print record lists and other information in the Archivists' Toolkit. The Archivists' Toolkit has many options for generating and printing reports, record lists, and other kinds of information. Some reporting options are only available to database administrators.

This section does not provide comprehensive coverage of the database's reporting functions. Check the full Archivists' Toolkit User Manual for additional information.

9.2 Printing and Exporting Search Results and Record Lists

1) Any information in the List Display Area can be printed or exported as a report.
2) Make sure the List Display Area contains the information you want (e.g., search results, filtered accession or resource list, etc.).
3) Click on the Reports Icon in the Horizontal Menu Area.
4) Select "Print Screen"
5) Choose the desired output format
6) "Click on "Print" or "Save."

9.3 Printing and Exporting Other Reports

1) Each section of the database can generate a number of specialized reports. For example, the Names section can generate a report of Names and "linked" records (e.g., Accessions, Resources, Digital Objects). The Resources section can generate a report of resources with restricted materials.
2) Navigate to the section of the database that contains the information you want to print or export.
3) If desired, perform a search or filter to narrow the data in the List Display Area.
4) Click on the Reports Icon in the Horizontal Menu Area.
5) Select the report you wish to print or export.
6) Choose the desired output format.
7) Click on "Print" or "Save."
8) Note that some reports may take a while to generate.